

## Health Insurance Counseling and Advocacy (HICAP) Aggregate Report

## Program: PSA 22 - Orange County Office on Aging HICAP

From: 07/01/2009 To: 06/30/2010

## Public and Media Data Report

	JUL-SEP Q1	OCT-DEC Q2	JAN-MAR Q3	APR-JUN Q4	TOTAL
<b>Type of Activity</b>					
<b>Interactive Presentations to Public in Person</b>					
Total Number of Events	0	71	38	53	162
Estimated Number of Attendees	0	3,436	1,389	1,712	6,537
Estimated Number of Persons Provided Enrollment Assistance	0	0	0	0	0
<b>Booths or Exhibits at Fairs or Special Events</b>					
Total Number of Events	0	4	1	1	6
Estimated Number of Attendees	0	1,150	1,000	250	2,400
Estimated Number of Persons Provided Enrollment Assistance	0	0	0	0	0
<b>Mobile InfoVan Events</b>					
Total Number of Events	0	1	0	0	1
Estimated Number of Attendees	0	35	0	0	35
Estimated Number of Persons Provided Enrollment Assistance	0	0	0	0	0
<b>Dedicated Enrollment Events</b>					
Total Number of Events	0	2	1	0	3
Estimated Number of Attendees	0	65	20	0	85
Estimated Number of Persons Received Any Enrollment Assistance	0	0	12	0	12
Enrollment Assistance with Medicare Programs(s)	0	0	12	0	12
Enrollment Assistance with Part D	0	0	0	0	0
Enrollment Assistance with LIS	0	0	0	0	0
Enrollment Assistance MSP	0	0	0	0	0
Enrollment Assistance with Other Medicare Program	0	0	0	0	0
<b>Radio Shows Live or Taped (Not a Public Service Announcement)</b>					
Total Number of Events	0	9	12	12	33
Estimated Number of Attendees	0	180,000	320,000	240,000	740,000
<b>TV/Cable Shows Live or Taped (Not a Public Service Announcement)</b>					
Total Number of Events	0	1	1	0	2
Estimated Number of Attendees	0	5,000	100,000	0	105,000
<b>Other Electronic Events (Public Service Announcements (Radio/TV), Ads, Crawls, etc.)</b>					
Total Number of Activities	0	0	0	0	0
Estimated Number of Persons Reached	0	0	0	0	0

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	Q1	Q2	Q3	Q4	
<b>Other Print Activity (newspaper articles, fliers, phamplets, etc.)</b>					
Total Number of Print Activities	0	9	46	104	<b>159</b>
Estimated Number of Targeted Persons Reached	0	162,000	320,196	446,088	<b>928,284</b>
<b>Presenters</b>					
<b>HICAP Paid Staff</b>					
Total Presenters	0	0	0	0	<b>0</b>
Total Hours for Length of Activities	0.00	0.00	0.00	0.00	<b>0.00</b>
<b>HICAP In-Kind Paid Staff</b>					
Total Presenters	0	0	0	0	<b>0</b>
Total Hours for Length of Activities	0.00	0.00	0.00	0.00	<b>0.00</b>
<b>HICAP Volunteer Staff</b>					
Total Presenters	0	0	0	0	<b>0</b>
Total Hours for Length of Activities	0.00	0.00	0.00	0.00	<b>0.00</b>
<b>Other Presenters</b>					
Total Presenters	0	0	0	0	<b>0</b>
Total Hours for Length of Activities	0.00	0.00	0.00	0.00	<b>0.00</b>
<b>Area of Focus</b>					
		12	11	8	
Dual Eligible with Mental Illness	0	0	0	0	<b>0</b>
Employer Termination - COBRA	0	0	0	0	<b>0</b>
General HICAP Information	1	65	76	151	<b>293</b>
Grievances / Appeals - Plan Issues	0	0	1	2	<b>3</b>
Long-Term Care / Insurance	1	0	4	10	<b>15</b>
Low Income Subsidy (LIS) / Application Assistance	1	3	3	5	<b>12</b>
Medicare (Parts A & B)	1	67	43	50	<b>161</b>
Medicare Advantage (Part C)	1	36	41	45	<b>123</b>
Medicare Fraud / Abuse	1	25	22	21	<b>69</b>
Medicare Prescription Drug Coverage (Part D)	1	53	43	48	<b>145</b>
Medigap / Medicare Supplements	1	23	39	47	<b>110</b>
Non-Medicare Fraud/Abuse	0	5	5	2	<b>12</b>
Other Topics / Issues (Health Specific)	1	10	16	24	<b>51</b>

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	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	TOTAL
	Q1	Q2	Q3	Q4	
Partnership Recruitment	0	0	0	0	0
Preventive Care Benefits	0	0	4	0	4
QMB/SLMB/QI	0	17	9	7	33
Volunteer Recruitment	0	0	0	0	0
<b>Targeted Audience</b>					
African American	0	0	1	1	2
American Indian or Naitave Alaskan	0	0	0	0	0
Asian Indian	0	0	0	0	0
Caucasian	1	50	12	5	68
Chinese	0	0	0	0	0
Disabled	0	24	29	25	78
Dual Eligible Groups	0	0	0	0	0
Employer Related Groups	0	31	32	38	101
Family Member/Caregiver of Beneficiary	0	49	52	64	165
Filipino	0	0	0	0	0
Guamanian or Chamorro	0	0	0	0	0
Hispanic / Latino	0	11	3	6	20
Hmong	0	0	0	0	0
Japanese	0	0	0	0	0
Korean	0	0	0	0	0
Low Income	0	38	31	35	104
Medicare Beneficiaries	1	84	76	131	292
Medicare Pre-Enrollees	0	0	0	0	0
Mental Health	0	11	10	3	24
Mental Health Professionals	0	0	0	0	0
Native Hawaiian	0	0	0	0	0
Other	0	1	3	2	6
Other Asian	0	34	31	31	96
Other Pacific Islander	0	0	0	0	0
Partnership Outreach	0	0	0	0	0
Presentations to Groups in Language Other than English	0	17	28	32	77
Rural	0	0	0	0	0
Samoan	0	0	0	0	0
Socail Work Professionals	0	0	0	0	0
Some Other Race or Ethnicity	0	0	0	0	0
Vietnamese	0	0	0	0	0

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#### Public and Media Data Report

	JUL-SEP Q1	OCT-DEC Q2	JAN-MAR Q3	APR-JUN Q4	TOTAL
<b>Web Site Hits</b>					
Total Web Hits to Local HICAP Web Site	0	0	0	0	0
<b>Literature from Events</b>					
General HICAP Brochure	40	0	25	250	315
"Taking Care of Tomorrow"	0	0	0	25	25
Other Publications (Created by or on Behalf of Local HICAP)	120	0	0	600	720
<b>Other Literature</b>					
Other Literature	0	0	0	0	0
Brochures from Quick Call	0	0	3	0	3

## Health Insurance Counseling and Advocacy (HICAP) Aggregate Report

## Program: PSA 22 - Orange County Office on Aging HICAP

From: 07/01/2009 To: 06/30/2010

## Client Contacts &amp; Demographics

	JUL-SEP Q1	OCT-DEC Q2	JAN-MAR Q3	APR-JUN Q4	TOTAL
<b>SECTION 1 - Client Contacts</b>					
Total Clients Counseled (unduplicated)	194	1,205	1,324	1,061	3,784
Total Finalized Intakes	188	1,175	1,349	1,062	3,774
<b>How did client learn about SHIP/HICAP?</b>					
Agency (Social Security, Medi-Cal, etc.)	46	347	517	355	1,265
Aging into Medicare Postacd - CDA HICAP	0	0	0	0	0
CDA HICAP	3	23	33	30	89
CHA	1	1	0	2	4
CMS/Medicare	12	90	109	105	316
Friend/Relative	15	68	55	53	191
InfoVan	1	0	2	1	4
Internet	0	3	4	2	9
Mailings	0	0	0	0	0
Media	29	246	281	190	746
Other	4	38	81	82	205
Presentations	2	22	27	22	73
Previous Contacts	0	0	1	0	1
State Website	0	0	0	0	0
Missing/Not Collected	75	337	239	220	871
<b>Mode of Client Contact</b>					
Quick Call Contacts	8	134	438	309	889
Contacts by Telephone	134	890	1,362	1,398	3,784
Contacts In Person at home	1	5	9	7	22
Contacts In Person at site	50	309	541	426	1,326
Contacts by E-Mail	3	25	328	1,175	1,531
Contacts by Mail/Fax	0	1	18	0	19
Total Number of Client Contacts:	196	1,364	2,696	3,315	7,571
<b>Contact Status Types</b>					
General info	1	2	13	5	21
Detailed Assistance	1	1	66	6	74
Problem Solving/Resolution	0	0	2	0	2
<b>Total Counseling Time Spent by Counselor Type</b>					
Program Manager	14.11	74.45	52.31	96.01	236.88
Volunteer	39.47	1,141.55	855.50	1,385.59	3,422.11
Paid	72.14	508.50	526.18	799.22	1,906.04
In-Kind	1.00	9.10	0.25	5.20	15.55
<b>SECTION 2 - Client Demographics</b>					
<b>Ethnicity</b>					
(Hispanic/Latino)	24	88	124	119	355
<b>Race</b>					
African American/Black	2	12	5	6	25

From: 07/01/2009 To: 06/30/2010

## Client Contacts & Demographics

	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	TOTAL
	Q1	Q2	Q3	Q4	
American Indian/Alaskan Native	1	0	2	1	4
Caucasian/White	90	544	688	564	1,886
Native Hawaiian	0	1	1	0	2
Guamanian or Chamoro	0	0	0	0	0
Samoan	0	0	0	2	2
Asian Indian	0	9	10	5	24
Chinese	6	14	23	12	55
Filipino	1	2	11	9	23
Japanese	2	7	9	8	26
Hmong	0	0	0	0	0
Korean	0	7	7	17	31
Vietnamese	38	244	259	186	727
Other Pacific Islander	0	0	2	1	3
Other Asian	0	2	5	9	16
Two or More Race	1	1	3	4	9
Some Other race	3	29	37	19	88
Not Collected	44	303	287	219	853
<b>Gender</b>					
Female	90	603	749	578	2,020
Male	88	529	545	425	1,587
Not Collected	10	43	55	59	167
<b>Monthly Income</b>					
Less than 150% of FPL	58	331	396	289	1,074
Equal To/Greater than 150% of FPL	65	406	460	378	1,309
Not collected	65	438	493	395	1,391
<b>Client Asset Limits</b>					
Below LIS Asset limit	0	0	2	0	2
At or Above LIS Asset Limit	0	0	0	0	0
Not Collected	188	1,175	1,347	1,062	3,772

From: 07/01/2009 To: 06/30/2010

## Client Contacts & Demographics

	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	TOTAL
	Q1	Q2	Q3	Q4	
<b>Total Clients that Checked Yes as Being</b>					
Veteran	5	53	58	49	165
Limited English Proficient (LEP)	41	304	339	276	960
Dual Eligible	25	256	259	188	728
Medicare Status Due to Disability	9	143	160	110	422
Dual Eligible due to Mental Disability	0	0	0	0	0
Applying/Receiving Social Security/Medicare Disability	0	0	4	0	4
<b>Age</b>					
Under 60	18	129	161	136	444
60-64	12	69	93	145	319
65-74	98	605	678	418	1,799
75-84	26	175	211	175	587
85+	11	101	85	79	276
Not Collected	23	96	121	109	349
<b>Marital Status</b>					
Married	85	491	550	435	1,561
Never Married	7	78	85	84	254
Separated	1	12	22	13	48
Divorced	29	130	166	127	452
Widowed	15	165	203	179	562
Domestic Partner	0	3	3	1	7
Not Collected	51	296	320	223	890
<b>Estimated Financial Saving</b>					
Clients with Financial Savings	13	156	192	87	448
Estimated Dollars Saved	\$10,200.00	\$215,034.77	\$409,786.32	\$175,978.56	\$810,999.65

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	Topics/Needs Discussed				
	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	
	Q1	Q2	Q3	Q4	TOTAL
Medicare Parts A&B (Original Medicare)					
Enrollment/Eligibility/Screening	50	320	558	561	1,489
Benefit Comparisons/Explanation/Coverge Changes	39	203	493	537	1,272
Appeals/Grievances	4	20	20	23	67
Billings/Claims	3	67	110	186	366
Fraud/Abuse	1	21	19	13	54
Quality of Care	0	0	0	0	0
LTC/LTCI					
Enrollment/Eligibility Assistance	4	16	36	66	122
Billings/Claims	0	3	4	30	37
LTC Partnership	0	0	0	0	0
Appeal/Greivances	1	2	4	1	8
Fraud/Abuse	0	0	0	0	0
Other LTC	0	0	0	0	0
Medigap/Supplement/SELECT					
Enrollment/Eligibility/Screening	25	178	291	293	787
Benefit Explanation	25	158	286	287	756
Appeals/Grievances	0	2	6	2	10
Billings/Claims	0	13	52	102	167
Fraud/Abuse	0	1	11	6	18
Disenrollment/Coverage Changes	1	10	102	173	286
Quality of Care	0	0	0	0	0
Plan Comparison	0	0	1	1	2
Marketing/Sales Complaints/Issues	0	0	0	0	0
Plan Non Renewal	0	0	0	0	0
Medicare Advantage (e.g., MSA, HMO, PPO, Specialty Plans)					
Eligibility/Screening	44	216	468	400	1,128
Benefit Explanation	39	201	457	392	1,089
Appeals/Grievances	5	25	33	42	105
Billings/Claims	3	27	90	134	254
Fraud/Abuse	4	2	17	15	38
Coverage Changes/Disenrollment	5	34	198	257	494
Plan Non Renewal	0	3	5	6	14
Plan Comparison	0	0	1	3	4
Enrollment/Enrollment Asistance	0	0	0	1	1
Quality of Care	0	0	0	0	0
Marketing/Sales Complaints or Issues	0	0	0	0	0
Medi-Cal					
Medi-Cal Screening (SSI, Nursing Home)	3	31	91	89	214
Medi-Cal Application Assistance	0	0	0	0	0



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	Topics/Needs Discussed				TOTAL
	JUL-SEP Q1	OCT-DEC Q2	JAN-MAR Q3	APR-JUN Q4	
MSP Screening (QMB, SLMB, Q-1)	13	54	108	141	316
MSP Application Assistance	0	0	2	0	2
Medi-Cal/QMB Claims	0	0	2	0	2
Fraud/Abuse	0	17	12	9	38
Other	31	183	353	316	883
<b>Other</b>					
Employer/Federal Health Benefits (FEHB)	5	76	96	56	233
Military Benefits	1	17	12	7	37
COBRA	4	19	17	22	62
Mental Health Topics	0	16	8	11	35
Fraud/Abuse	0	1	2	3	6
Other Health Insurance	0	0	0	0	0
Other	9	46	64	67	186
<b>Part D - Medicare Prescription Drug Coverage</b>					
Benefit Explanation	0	0	18	2	20
Eligibility/Screening	57	345	529	490	1,421
Plan Comparison	51	443	547	473	1,514
Enrollment/Anrollment Assistance	11	104	128	119	362
Billings/Claims	4	40	78	108	230
Coverage Changes	5	52	178	266	501
Re-enrollment	1	4	3	6	14
Disenrollment	0	1	6	5	12
TROOP	1	2	6	60	69
Other	2	21	70	67	160
<b>LIS / Extra Help</b>					
Eligibility / Screening	11	102	172	158	443
Benefit Explanation	0	0	4	0	4
Application Assistance	4	52	92	74	222
Claims/Billings	0	0	0	0	0
Appeals / Grievances	2	3	13	9	27
<b>Other Prescription Drug CoveragePlans</b>					
Union/employer	0	5	18	6	29
PPARx	2	2	2	3	9
Military Drug Benefit	0	0	0	0	0
Manufacturer Program	0	3	2	3	8
Other	1	4	4	8	17
<b>Part D Plan Problems (Non-Compliance Services Unmet)</b>					
Eligibility	2	23	29	16	70
Lag Time	0	5	3	5	13
Multiple Enrollment	0	1	2	3	6
Poor Training of Agents	0	1	2	0	3
Poor Training of CSR	0	0	0	0	0

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	Topics/Needs Discussed				TOTAL
	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	
	Q1	Q2	Q3	Q4	
Fraud/Abuse	0	0	4	3	7
Marketing Fraud/Abuse	0	1	2	1	4
Agent fraud/abuse	0	1	3	2	6
Formulary problems/changes	0	3	12	6	21
Dosage problem	0	0	1	0	1
Data problems	0	1	7	3	11
Delay in medications	0	1	5	9	15
Incorrect Co-Pay/Can't Afford Co-Pay	0	3	8	3	14
Client reached donut hole	3	9	4	12	28
SSA Premium withheld	0	0	2	0	2
Appeals/Grievances	0	0	0	0	0
Quality of Care	0	0	0	0	0
Plan Non Renewal	0	0	0	0	0
<b>HICAP Legal Services</b>					
Referrals to HICAP Legal	0	6	10	17	33
Legal Clients Served	0	8	26	25	59
Cases Opened	0	8	10	17	35
Cases Closed	0	11	6	8	25
Favorable Closed Case Results	0	4	5	6	15
Client Representation Hours	0	8	14	12	34
Consultation to Program Hours	0	34	33	19	86
HICAP Legal Clients that Saved	0	4	4	2	10
Estimated Financial Savings	\$0.00	\$13,000.00	\$14,975.00	\$3,950.00	<b>\$31,925.00</b>

**Health Insurance Counseling and Advocacy (HICAP) Aggregate Report****Program: PSA 22 - Orange County Office on Aging HICAP**

From: 07/01/2009 To: 06/30/2010

**Complaints Filed**

	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	
	Q1	Q2	Q3	Q4	TOTAL
<b>Medicare Part D Complaints Filed</b>					
CDI:	0	0	0	0	<b>0</b>
CMS:	0	1	0	0	<b>1</b>
Part D Plan:	0	1	1	2	<b>4</b>
SMP:	1	1	1	1	<b>4</b>
Urgent Fax:	0	0	0	0	<b>0</b>
800 Medicare:	0	0	0	1	<b>1</b>
Other:	0	9	9	9	<b>27</b>
<b>TOTAL MEDICARE PART D COMPLAINTS</b>	<b>1</b>	<b>12</b>	<b>11</b>	<b>13</b>	<b>37</b>

**All Other Complaints**

APS :	0	0	0	0	<b>0</b>
CDI:	0	1	0	0	<b>1</b>
CMS:	0	0	0	0	<b>0</b>
QIO:	0	0	0	0	<b>0</b>
SMP:	0	1	0	1	<b>2</b>
Other:	0	1	3	8	<b>12</b>
<b>TOTAL ALL OTHER COMPLAINTS</b>	<b>0</b>	<b>3</b>	<b>3</b>	<b>9</b>	<b>15</b>

**800 Medicare Line Issues**

<b>Total number of Calls with Issues</b>	<b>2</b>	<b>15</b>	<b>9</b>	<b>9</b>	<b>35</b>
<b>Total duration of calls</b>	<b>0.07</b>	<b>1.01</b>	<b>14.03</b>	<b>17.36</b>	<b>32.47</b>